

顺应历史潮流 迎接时代挑战

携手谱写中欧航空合作共赢新篇章

Working Together for China-EU Win-Win Cooperation in Aviation

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中国南方航空
CHINA SOUTHERN AIRLINES



中欧民航交流合作不断深化 Deepened China-EU Cooperation in Civil Aviation



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中国与欧盟28个成员国中的27个国家签订或草签了双边航空运输协定
China and 27 of the 28 EU member states signed or initialled bilateral air services agreements

中欧民航在安全、航空工业、人才培养等方面的合作朝着更加开放、灵活、务实、紧密的方向发展
China and the EU are engaging in more open, flexible, pragmatic and closer cooperation in flight safety, aviation industry and personnel training, etc.

中欧航空市场 China-EU Aviation Market



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10家中国航企经营90条中欧航线：
84条客运航线，9条货运航线

10 Chinese airlines operate 90 China-EU air services, including 84 passenger services and 9 freighter services

25家欧洲航企经营69条中欧航线：
50条客运航线，23条货运航线

25 European airlines operate 69 China-EU air services, including 50 passenger services and 23 freighter services

中欧航空市场 China-EU Aviation Market



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- 2017年中欧航空市场增速高达17.3%
China-EU aviation market grew at 17.3% in 2017
- 德国、法国、荷兰、意大利、土耳其等国航空市场复苏
Aviation markets in Germany, France, the Netherlands, Italy and Turkey are recovering



南航国际航空枢纽建设

China Southern's International Hub Construction



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南航自2009年开始加快战略转型，围绕广州枢纽全力打造“广州之路”，参与全球市场竞争，大幅增加包括欧洲在内的国际市场投入，保持了较快的增长态势

China Southern Airlines started to accelerate strategic transformation in 2009, committed to developing the “Canton Route” around the Guangzhou hub. By participating in global competition and significantly increasing capacity input in the international market including Europe, China Southern has maintained a rapid growth momentum



“广州之路” - 全球航空枢纽

“Canton Route” - A New International Aviation Hub

航线网络日益完善 Enhanced Route Network



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● 2009年已有通航点 Destinations in 2009

● 增加通航点 New destinations since 2009

客运 Passenger Business :

➢ 7个通航点：伦敦、巴黎、法兰克福、阿姆斯特丹、莫斯科、圣彼得堡、罗马

7 destinations: London, Paris, Frankfurt, Amsterdam, Moscow, St. Petersburg and Rome

➢ 15条航线，每周124个往返航班，同比2008年增长416.7%

15 routes, 124 weekly flights, a year-on-year increase of 416.7% compared with 2008

➢ 近10年欧洲航线座公里投入年均增幅8.5%

An annual average increase of 8.5% in ASK input on the European routes over the past decade

➢ 去年南航投入运力96.7亿座公里，运输旅客量109万人次，占中欧市场份额5%

Last year, CZ invested 9.67 billion ASKs and transported 1.09 million passengers, accounting for 5% share of the China-EU aviation market

货运 Cargo Business :

➢ 广州、上海至伦敦、法兰克福、阿姆共7条航线

7 routes departing from Guangzhou, Shanghai to London, Frankfurt and Amsterdam

➢ 每周26个航班

26 weekly flights

运营经验日益丰富 Enriched Operational Experience



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南航广州-伦敦航线

CZ Guangzhou-London air service

◆2012年6月开航：每周3班

Launch in June 2012 with 3 weekly flights

◆2014年：加密至每天1班

Increased to daily services in 2014

◆2017年：通过置换时刻实现每天2班

Further increased to double daily services in 2017 through slot swap

全年航班量：1059班

1059 flights in total for the whole year

服务品牌日益提升 Enhanced Customer Services and Brand



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着力提升中欧航线的服务水平：

To enhance customer services on China-EU air services:

◆ 升级洲际航线机型

To upgrade aircraft for intercontinental routes

◆ 招聘法籍、荷籍空乘

To recruit French and Dutch flight attendants

◆ 提升机上餐饮和机上娱乐水平

To improve in-flight catering and entertainment systems



◆ 近年来，全球航空业发展出现了一些新变化

New changes have taken place in the global aviation industry in recent years

◆ 随着全球航空市场需求不断增长，全球航空业将迎来全新的发展局面

With growing demand, the global aviation industry will embrace new developments

◆ 全球航空业发展面临更多不确定性

The global aviation industry will be faced with more uncertainties

◆ 中欧双方应顺应时代潮流，进一步深化合作，积极适应全球航空业发展的新趋势，促进全球航空业治理体系、治理能力更加规范、公平和合理

China and the EU should follow the trend of the times, deepen cooperation to meet the new trends of the global aviation industry and make the global governance system and capability more standard, fair and reasonable



根据中国民航“十三五”规划预测，到2020年中国人均航空出行次数将达到0.5次，民航旅客运输量7.2亿人次，年均增长10.4%。其中出境旅游将超过2亿人次。

The 13th Five-year Plan of China's civil aviation forecasts that by 2020, each Chinese citizen will take 0.5 flight on average, and passenger numbers will reach 720 million, an annual average increase of 10.4%. Outbound tourists will exceed 200 million.

预计到2035年，人均航空出行次数超过1次，旅客运输量将达到15亿人次，还有将近10亿的增量空间。

It is estimated that by 2035, each Chinese citizen will take more than 1 flight on average, and passenger numbers will amount to 1.5 billion, with potential for an increase of another 1 billion.

国际航协预计2022年中国将超越美国，成为全球最大的航空市场。

IATA forecasts that by 2022, China will outpace the US to become the world's largest aviation market.



围绕广州-北京“双枢纽”战略布局，持续完善航线网络结构

To enhance the route network based on the Guangzhou-Beijing “dual hub” strategy

对标世界一流，提升空地服务质量

To benchmark ground and in-flight services against world-class standards for improvement

加强国际合作，拓展国际发展空间

To strengthen international cooperation for further growth of the international business

围绕广州—北京“双枢纽”战略布局，持续完善航线网络结构
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“dual hub” strategy



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1、持之以恒打造广州枢纽，夯实发展根基

To build up the Guangzhou hub

2、加大北京枢纽建设力度，拓展发展空间

To develop the Beijing hub

3、发挥基地众多优势，形成整体联动

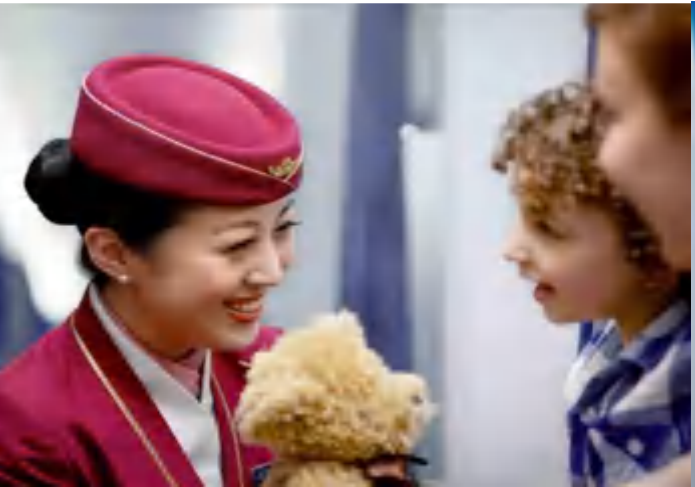
To leverage the advantages of various operating bases



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加强国际合作，拓展国际发展空间

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➤ **在天合联盟框架下，深化与英航等战略合作伙伴的双边合作**

To deepen bilateral cooperation with strategic partners like British Airways under the SkyTeam framework

➤ **在全球范围内寻找战略合作伙伴，建立更加稳固的全面双边和多边关系**

To look for strategic partners globally and establish solid, comprehensive bilateral and multilateral partnership

期望与建议

Expectations & Suggestions



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希望与机场和航空公司开展更深层次的合作

We hope to engage in more in-depth cooperation with airports and airlines

希望建立更加完善的航空安全领域合作

We hope to enhance the mechanism for cooperation in aviation security

希望欧洲空管加快单一天空的新技术应用，协助航空公司减少碳排放，节省燃油消耗

We hope that the EU ATC will accelerate the application of new technologies under the "Single European Sky" initiative to help airlines reduce carbon emission and fuel consumption

谢谢！
THANK YOU!



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